



# eProcure User Manual

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# Introduction

eProcure is the College's electronic purchasing software. This software is used to generate purchase orders. Orders are created in a shopping cart and then submitted for approval and processing. Completed purchase orders are then sent to the vendor via email or fax.

eProcure has established work-flow steps based on various criteria. Common steps include Budget Authorization, Fund Approval, IT Buyer Review, Procurement Review, etc.

For eProcure to work efficiently the [Index/FOP Access Form](#) must be updated to reflect current staff and their allowed eProcure approval limits (if any). Out-dated or non-existent forms will delay the automated ordering/approving workflow.

All College employees have access to eProcure as a shopper by default. No additional action is needed if a user will only have shopper authority.

The Office of Procurement offers monthly hands-on training sessions. Tutorials are also available on our [website](#).

## Accessing eProcure

The College's eProcure system can be accessed through MyCharleston. First, log into MyCharleston (<https://my.cofc.edu>). From there, click on the eProcure shopping cart icon in the top navigation bar. Clicking on the eProcure icon will launch a new window.



### Common Problems Accessing eProcure

Users may occasionally experience the following problems accessing eProcure.

#### Internet Browser

Mozilla Firefox, Internet Explorer and Google Chrome all support eProcure. Safari is not compatible.

#### Pop-Up Blockers

The most common problem accessing eProcure is that the internet browser is blocking pop-ups. There is usually an on-screen notification explaining that a window has been blocked. The settings to change this vary from browser to browser and are not hard to change. If a blank window or no pop-up window it can be forced to open if using a PC. To force the window to open, hold down the *ctrl* key on the keyboard and simultaneously hold down the eProcure icon. If the eProcure window opens, then the problem is the pop-up blocker settings on the internet browser.

## Update Contact Information

First time users experiencing difficulty accessing eProcure should verify that their College of Charleston address and business phone number is listed under the Employee Tab in Banner Self-Service.

If not, add the address and phone number, by going to MyCharleston, then the *Employee* tab, and finally to the Banner Self-Service folder (see below).

The screenshot shows a horizontal navigation bar with tabs: Home, My Accounts, Help & Training, Library, Employee (which is highlighted in red), and Finance. Below this is a dark header bar labeled "Banner Self-Service". Underneath is a list of links categorized by folder: Banner Self-Service, Personal Information, Employee, and Finance. Under "Personal Information", there are several links: View E-mail Addresses, Update E-mail Addresses, View I.C.E. Emergency Contacts, Update I.C.E. Emergency Contacts, View Ethnicity and Race, Update Ethnicity and Race, Update Marital Status, Name Change Information, eProcure, View Phones, Update Phones, View Addresses, and Update Addresses. The "Update Phones" link is underlined in red. The "Employee" folder contains two links: Employee and Finance.

Click on the *Update Phones* link. The following page will open:

The screenshot shows a page titled "Update Phones". At the top, there's a search bar and links to RETURN TO MENU, SITE MAP, and HELP. The main content area has a yellow header "FOR STUDENTS:" followed by text about the CougarAlert system. Below it is another yellow header "FOR EMPLOYEES:" with text about the CofC office phone. At the bottom left is a "Phones" section with "CofC Office" and "Cell Phone with text" entries. At the bottom right is a button labeled "Insert a New Telephone Number Not Listed Above". A black arrow points from this button to a callout box on the right.

### Insert a New number.

Select “College of Charleston” from the drop-down menu, insert the number (no dashes) and click on the *Submit* button.

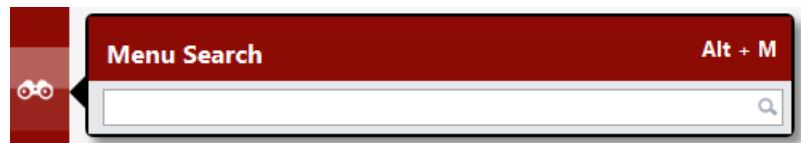
# Home/Shop Page

eProcure will open to the Home/Shop page.

The screenshot shows the eProcure interface. On the left is a vertical red navigation bar with icons for Home, Shopping Cart, Forms, and Reports. The main content area has a white header with the user name 'Cheryl Drum' and various links like Action Items, Notifications, and a shopping cart icon showing '1,057.02 USD'. Below the header is a breadcrumb trail: Shop > Shopping > Dashboard > Shopping Home > Home/Shop. A search bar with the placeholder 'Shop Everything' and a 'Go' button is present. Below the search is a link to 'Hosted Catalogs' with logos for icamcor, inc., CAROLINA, CBI, Central Stores, FASTENAL, and Fisher Scientific. A banner on the left states: 'Proud recipient of the National Procurement Institute's Achievement of Excellence in Procurement Award for 2012! The College of Charleston is the only organization in South Carolina and one of only 17 institutes of higher education'.

Use the left navigation bar to navigate within eProcure. Also, at the top right-hand corner of the window are short-cuts to the user's profile, pending actions, notifications and active shopping cart.

The user can also search for menu items using the Menu Search. The binoculars icon is located in the bottom left-hand corner of the Home/Shop page



Please refer to the following sections for specific instructions on using and navigating eProcure

## User Profile Settings

All user settings can be accessed by clicking the user's name at the top-middle of the home page. Select *View My Profile* from the menu. Contact information from Banner Self-Service is automatically loaded into eProcure.

A callout box highlights the user profile dropdown menu for 'Cheryl Drum'. The menu includes options: View My Profile, Set My Home Page, Logout, and Search Help For A Solution. Below the menu, a message states: 'You do not have any recent orders'. The rest of the page is identical to the first screenshot, showing the navigation bar, search bar, and hosted catalogs.

The following page will open. From this screen, various user settings can be set-up or changed.

This screenshot shows the 'My Profile' page for Cheryl Drum. On the left, there's a vertical toolbar with icons for Home, Shopping Cart, Documents, Edit, Bank, and Lock. The main area has a header 'Cheryl Drum' with a dropdown arrow, a star icon, Action Items, Notifications, a shopping cart icon with '0.00 USD', and a search icon. Below the header, it says 'My Profile'. On the left side of the main content, there's a 'User Profile' box with a photo of Cheryl Drum, her name 'Cheryl Drum', her email 'drumcs', and status 'Active'. To the right is the 'My Profile' section with a sub-header 'User Information and Settings'. It lists several items: User's Name, Phone Number, Email, etc.; Custom Field and Accounting Code Defaults; Default Addresses; Language, Time Zone and Display Settings; Email Preferences; Change Password; and a 'Show All...' link.

Settings that can be changed are listed under the *User Information and Settings* section. Click on the *User's Name, Phone Number, Email, etc.* line to add/change the department and add/change the email approval code (only for those employee's with approval authority).

This screenshot shows the 'User's Name, Phone Number, Email, etc.' edit page. The left sidebar has the same icons as the previous screenshot. The main content shows the 'User's Name, Phone Number, Email, etc.' section with fields for First Name (Cheryl), Last Name (Drum), and Phone Number (1 843 9532756). Below that is an 'E-mail Address' field with 'drumcs@cfc.edu' and an 'Email User' button. A 'Department' dropdown is set to 'Procurement (Procurement)'. There are also fields for Position, Badge ID, and User Name ('drumcs'). A note says 'Please enter a question and answer that we can prompt you with should you ever forget your password.' with fields for Question ('What is the middle name of your oldest child?'), Answer ('\*\*\*\*'), Confirm Answer ('\*\*\*\*'), Authentication Method ('Local'), and Email Approval Code ('\*\*\*\*\*'). At the bottom is a 'Save' button.

Choose the department from the drop-down menu. See Approvals section for additional information on the Email Approval Code.

**Be sure to click the Save button when finished making changes!**

## Email Preferences

Eprocure assigns default email preferences based upon a user's role within eProcure. To view default email settings or to change settings, click on the *Email Preferences* line within the *User Profile*. Several email and notifications are set by default. There are drop-down menus next to each option to select the user's preference.

The screenshot shows the 'Email Preferences' section of the 'User Information and Settings' page. On the left, a sidebar lists 'USER INFORMATION AND SETTINGS', 'USER PROFILE AND PREFERENCES' (which is expanded), and 'Email Preferences' (which is selected and highlighted in blue). The main content area is titled 'Email Preferences' and contains a message: 'The in-application notifications are not yet available for all Email Preferences.' Below this, two sections of dropdown menus are shown: 'Administration & Integration' and 'Shopping, Carts & Requisitions'. Each section has several items listed with their current default settings.

Section	Item	Default Setting
Administration & Integration	Prepared By - PO Distribution Failure Notice	None (Default)
	User Registration pending approval	None (Default)
	Search Result Export Confirmation	None (Default)
	PR Workflow Step error notice	None (Default)
	PR Export Failure Notification	None (Default)
	PO Workflow Step error notice	None (Default)
	PO Distribution Failure Notice	None (Default)
	PO Export failure notification	None (Default)
	Daily customer feedback report	None (Default)
Shopping, Carts & Requisitions	Prepared By - Cart Assigned Notice	None (Default)
	Prepared By - PR line item(s) rejected	None (Default)
	Prepared By - PR rejected/returned	None (Default)
	Cart Assigned Notice	Email & Notification (Default)
	Receive PR and PO notifications for Carts Assigned to Me	None (Default)
	Assigned Cart Processed Notification	None (Default)
	Assigned Cart Deleted Notification	None (Default)

**Be sure to click the Save button when finished making changes!**

## Adding a Purchasing Card

PCard holders can add their card to their user profile by selecting the *Custom Field and Accounting Code Defaults* line from the menu.

The screenshot shows the 'My Profile' page. On the left, a sidebar lists 'User Information and Settings' (which is expanded), 'Custom Field and Accounting Code Defaults' (which is selected and highlighted in blue), 'Default Addresses', 'Language, Time Zone and Display Settings', 'Email Preferences', and 'Change Password'. A black arrow points from the text 'Custom Field and Accounting Code Defaults' to the corresponding menu item in the sidebar.

The following window will open:

This screenshot shows the 'Custom Field and Accounting Code Defaults' page. At the top, there's a navigation bar with links for Cheryl Drum, Action Items, Notifications, 200.00 USD, and a search icon. Below the navigation is a breadcrumb trail: My Profile > User Information and Settings > Custom Field and Accounting Code Defaults. On the left, a sidebar menu includes icons for Home, Shopping Cart, Documents, Edit, Bank, Lock, and Settings. The main content area has tabs for Header (int.), Header (ext.), Codes, and Code Favorites. A table header row is visible with columns for Custom Field Name, Default Value, Description, and Edit Values.

Select Payment Options from the menu. The page will open to allow the user to add a new card number and store it securely.

Click the blue *Add a New Card* button and fill in the PCard information under the card details fields.

This screenshot shows the 'Payment Options' page. The top navigation and sidebar are identical to the previous screenshot. The main content area features a 'Payment Options' section with a checkbox labeled 'Apply the default card.' and a blue 'Add a New Card' button. To the right is a 'My Cards' list and a 'Card Details' form. The 'Card Details' form includes fields for 'Name this card (e.g. My Visa)', 'Cardholder Name', 'Card Number', 'Expiration Date' (set to 1/2014), and a 'Default card' checkbox which is checked. A 'Save' button is at the bottom of the form.

**Do not check** the "Apply the default card" checkbox or all of the orders will be paid through the PCard by default instead of through Accounts Payable.

Storing the card information in the user profile will speed up the check-out process when paying with the PCard.

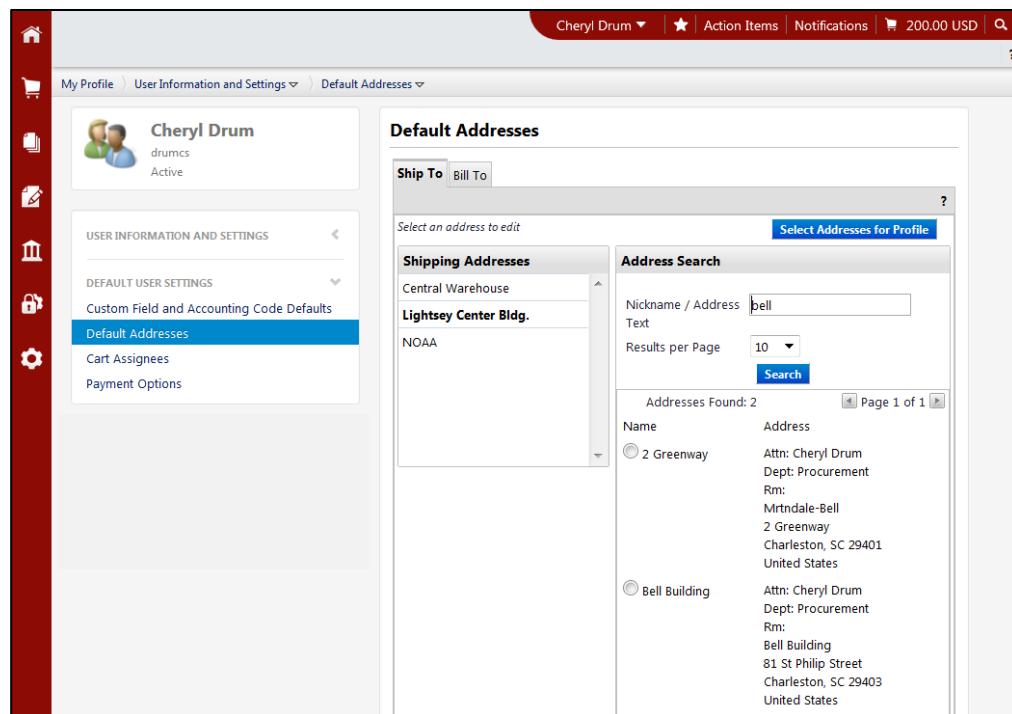
**When finished, click the Save button!**

## Adding a Default Ship-To Address

The user's default address will need to be added to their profile. Click on the *Default Addresses* line within the user's profile.



To add a Ship-To address, click on the blue *Select Addresses for Profile* button. This will open a search box. Search for a College of Charleston address by entering either a partial name in the *Nickname or Address Text* field.



As illustrated in the screenshot above, entering "Bell" in the *Nickname* field will retrieve the Bell Building address. Alternately, entering "81" in the *Address Text* field will also return the Bell Building address.

**The Procurement Office recommends searching by the Address Text field.**

Once the desired address is located, select it by clicking on the radio button (  ) next to the building name. The next step allows the user to customize the address by assigning it a nickname, a default Attention-To person, Department and Room Number. The address can be set as the default address in this step by ticking the “Default” checkbox.

Users can add multiple addresses to their profile. During the check-out process, the ship to address can be changed from the default address to one in the profile. This is helpful if ordering for different locations.

**Be sure to click the Save button when finished!**

# Shopping

Shopping with eProcure is very similar to shopping online at sites such as Amazon. All items to be ordered are first placed into a shopping cart. Once the cart contains all items for the order, the order is submitted by taking the cart through the “check out” process.

## Shopping Roles

The requisition process in eProcure is divided between different roles:

- **Shopper:** This is the default role, and any user can be a Shopper. A Shopper has the ability to find and add items to a cart, but does not have the ability to submit a cart for ordering. A Shopper may assign a shopping cart they have created to a Requisitioner or to an Approver.
- **Approver:** An approver can do anything a Shopper can do, but an Approver can also submit carts for order up to their authorized dollar amount.

## Types of Shopping

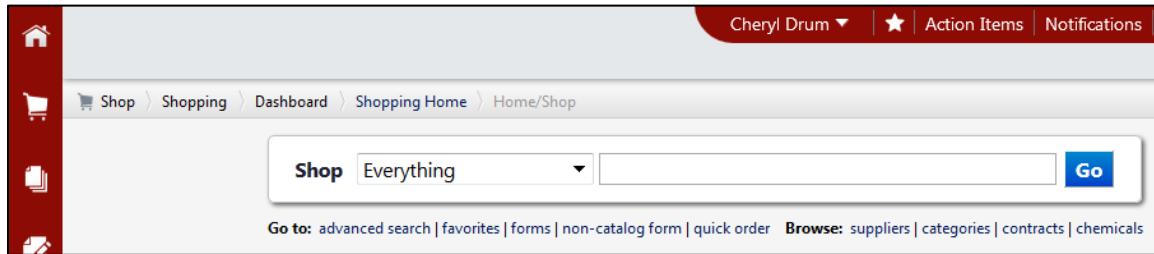
There are three ways to order items within eProcure:

- **Hosted Catalogs:** Hosted catalogs are vendors whose catalogs have been downloaded to our site. An advantage to having these catalogs hosted within eProcure is that the user has the ability to check the product details of the catalog items and compare prices and specifications, much like any major electronic shopping website.
- **Punch-out Suppliers:** Punch-outs are vendors whose catalogs are not hosted on our site. When the user clicks on a Punch-out Supplier, they are connected to the supplier’s website. On that website, the user will create the order, and when finished shopping the items in the cart will be transferred back to eProcure and will appear within the user’s active eProcure cart.
- **Non-Catalog Suppliers:** Much of the ordering that is done at the College will be done through Non-Catalog item shopping since the majority of the College’s suppliers are not electronically integrated with eProcure and do not support electronic ordering in this fashion. This type of order is similar to filling out a paper requisition. It requires the name of the supplier, a description of the product or service and the quantity and cost of the product or service.

## Hosted Catalog Suppliers

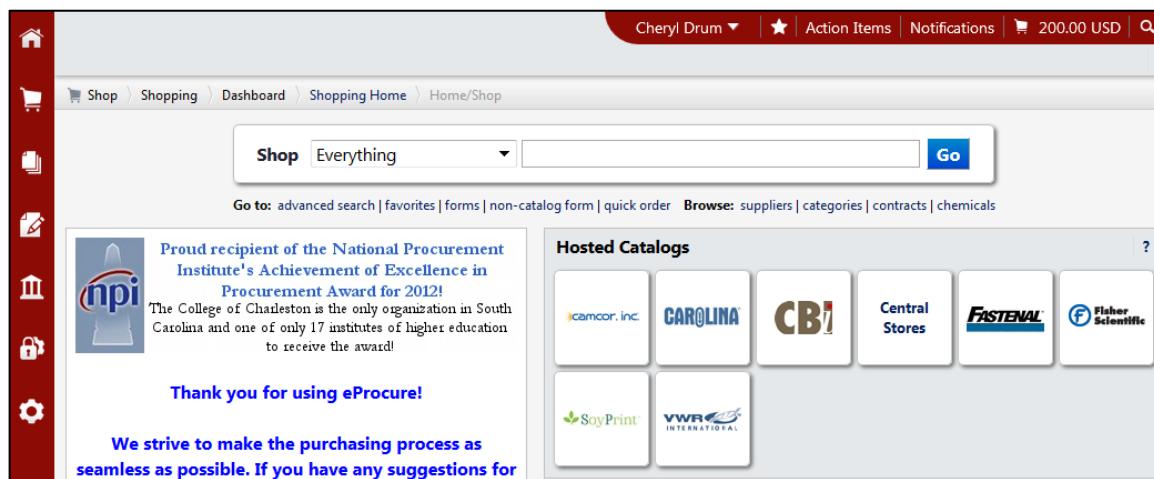
Hosted suppliers appear on the top of the main shopping page. Use the “Shop” field at the top search bar to search all suppliers and add items to the order.

Similar to an internet search engine, the user can perform a broad search using only a couple of words such as “glass flask,” or a very specific search with additional search terms (i.e. “glass flask 500ml stopper”). Using specific search terms yields fewer and more specific results.



The screenshot shows the eProcure Shopping Home page. At the top, there is a red header bar with the user's name "Cheryl Drum" and navigation links for Action Items and Notifications. Below the header is a breadcrumb trail: Shop > Shopping > Dashboard > Shopping Home > Home/Shop. In the center, there is a search bar with the word "Everything" and a dropdown arrow, followed by a blue "Go" button. Below the search bar is a link to "advanced search" and other browse options like "suppliers", "categories", "contracts", and "chemicals". On the left side, there is a vertical red sidebar with icons for Home, Shopping, Dashboard, and Shopping Home.

Alternately, click on the catalog icon to search only within the suppliers' catalog in eProcure.



This screenshot is similar to the previous one, but the "Catalog" icon in the sidebar is highlighted. It shows the same search interface and sidebar. Additionally, there is a message on the left side: "Proud recipient of the National Procurement Institute's Achievement of Excellence in Procurement Award for 2012! The College of Charleston is the only organization in South Carolina and one of only 17 institutes of higher education to receive the award!" Below this message, there is a "Thank you for using eProcure!" message and a note: "We strive to make the purchasing process as seamless as possible. If you have any suggestions for". To the right, there is a section titled "Hosted Catalogs" featuring logos for various suppliers: iCamcor, Inc., CAROLINA, CBI, Central Stores, FASTENAL, Fisher Scientific, SoyPrint, and VWR INTERNATIONAL.

The screenshot shows the eProcure interface with a sidebar containing various icons and filters. The main search bar has 'Shop Everything' selected and 'glass flask' typed in. Below the search bar are links for advanced search, favorites, forms, non-catalog form, quick order, and browse categories. The results list displays four items, each with a thumbnail, part number, manufacturer info, price, quantity selector, 'Add to Cart' button, and 'add favorite | compare' links.

Item Description	Part Number	Manufacturer Info	Price	Quantity	Action Buttons
<b>CG-1611-34 Flask, Freeze Dry, 600ML, Flat bottom, Borosilicate glass, Wide mouth, FTS style</b> from Fisher Scientific Company LLC	CG161134	CG-1611-34 - (Chemglass Life Sciences Llc)	109.50 USD	EA	<input type="button" value="1"/> Add to Cart <a href="#">add favorite</a>   <a href="#">compare</a>
<b>CG-1611-35 Flask, Freeze Dry, 1200ml, Flat bottom, Borosilicate glass, Wide mouth, FTS style</b> from Fisher Scientific Company LLC	CG161135	CG-1611-35 - (Chemglass Life Sciences Llc)	119.89 USD	EA	<input type="button" value="1"/> Add to Cart <a href="#">add favorite</a>   <a href="#">compare</a>
<b>Erlenmeyer Flask Glass 50mL PK 12</b> from GRAINGER INC	8AFK3	2650050 - (KIMBLE CHASE)		EA	<a href="#">Order from Supplier</a> <a href="#">add favorite</a>   <a href="#">compare</a>
<b>Erlenmeyer Flask Glass 250 ml Pk 12</b> from GRAINGER INC	8APYS	26650250 - (KIMBLE CHASE)		EA	<a href="#">Order from Supplier</a> <a href="#">add favorite</a>   <a href="#">compare</a>

In the above picture, 4,000+ items were found for the search terms “glass flask.” Narrow the results by adding Keywords or by the Filter Results box to the left of the item list.

An advanced search is accomplished by clicking the *advanced search* link below the search bar. See screenshot below.

The screenshot shows the 'Advanced Search' dialog box. It includes fields for 'Find Results That Have:' (All of These Words: 'glass flask 500ml stopper', Supplier: [empty], Part Number (SKU): [empty], Manufacturer Name: [empty]), 'Other Options' (Exact Phrase: [empty], Exclude Words: [empty], Any of These Words: [empty]), and a 'Search' button. There is also a checkbox for 'Hide Advanced Search on search results'.

This will expand the search area to include new fields to choose from such as Part Number (SKU), Supplier, and Manufacturer Name.

The screenshot shows a search results page with the following details:

- Results for:** Everything : glass flask 500ml stopper
- Showing 1 - 100 of 224 results**
- Sort by:** Best Match
- Order from Supplier:** EA
- Items:**
  - E5667 Flask 500mL Red Glass Stopper Pk 6** from GRAINGER INC
    - Part Number: 8XG17
    - Manufacturer Info: 92822G500 - (KIMBLE CHASE)
  - E5656 Flask 500mL Glass Stopper Pk 6** from GRAINGER INC
    - Part Number: 9E888
    - Manufacturer Info: 92812G500 - (KIMBLE CHASE)
  - FLASK GLASS STOP 500 ML PK2 Hirschmann volumetric glass flask 500 mL class A TC according to ASTM E288 specifications tolerance +/- 0.20 mL with TS glass-stopper no. 19 with fine white graduation line and marking spot pack of 2** from VWR SCIENTIFIC PRODUCTS
    - Part Number: 89025-758 (PK)
    - Manufacturer Info: 282-G-500 - (HIRSCHMANN INC)
- Unit Price:** 65.31 USD
- Quantity:** 1 UNIT, PK
- Add to Cart:**
- Other Options:** add favorite | compare

Once the desired item(s) are identified, there are several things that can be done:

- Add the item(s) to the Cart by clicking on the blue *Add to Cart* button
- Compare two or more items by clicking on the *compare* link underneath the *Add to Cart* button and then on the *Compare Selected* button on the top of the search results
- Add an item to the favorites list for easy access by clicking on the *add favorite* link next to the *compare* link.

## Punch-out Suppliers

Punch-out Suppliers all have their own dedicated websites.

The screenshot shows a punch-out interface with the following components:

- Address Bar:** http://procurement.cofc.edu/procurement-forms-and-procedures/
- Punch-out Buttons:** A grid of logos for various suppliers, including:
  - Apple
  - B&H
  - BIO-RAD
  - DELL
  - Gateway COMPUTER PRODUCTS
  - GRAINGER
  - hp invent
  - MLC Industrial Supply Co.
  - OfficeMax
  - shi
  - SIGMA-ALDRICH
  - TROXELL

For example, clicking on the OfficeMax logo will direct the user to the College of Charleston's Office Max punch-out site.

The screenshot shows the 'College of Charleston Punchout' website. At the top right is a 'Cancel Punch-out' button. The main header features the 'OfficeMax WORKPLACE' logo. Below the header, there are two tabs: 'Manage Orders' (which is selected) and 'Your Profile'. On the left, there is a sidebar with sections for 'Shopping' (Create New Order, Saved Orders, Repeat Orders, Manage Shopping Lists, Browse Catalog Only) and 'Service Center' (Order History, View Invoices, Track an Order, Request a Return, Request a Catalog, Request Product Information, Customer Service). The main content area is titled 'Manage Orders' and displays a message: 'Hello, Cheryl Drum' and 'Updates & Action Items' (with a checked checkbox). It states, 'You have no items requiring your attention at this time.' Below this is a 'Messages' section with a 'Messages' tab and a 'News/Updates (0)' tab. A message board entry is shown: 'Using the Message Board' dated '1/16/2014', which says, 'You can post up to ten messages which can be viewed by everyone in your organization. If you are an administrator, or if your administrator has given you the authority to post messages, then click on the Account Setup tab and select Message Board from the Administrative options area.'

Each punch-out supplier has their unique website, each with a different layout. Shop within their site and build an order similar to shopping on any other website. Once the order is complete and goes through the checkout process, the items from the punch-out order will be transferred into the user's eProcure shopping cart. The order can then be submitted for approval.

To cancel the order and return to eProcure, the user should click on the blue *Cancel Punch-out* button at the top right of the screen.

## Non-Catalog Suppliers

To order goods or services from a vendor that is neither a *Hosted* nor a *Punch-out* Supplier, requires that item(s) be added to a shopping cart via the *Non-Catalog* Form. The link to the form can be found just below the "Shop" search field at the top search bar. Click on the link to open the *Non-Catalog* Form.

The screenshot shows the 'Non-Catalog Suppliers' interface. On the left is a vertical navigation menu with icons for Home, Shopping, Dashboard, and Shopping Home. The main header includes a 'Chery' logo. The top navigation bar shows the path: 'Shop' > 'Shopping' > 'Dashboard' > 'Shopping Home' > 'Home/Shop'. Below this is a search bar with a 'Shop' button, a dropdown menu set to 'Everything', and a text input field. At the bottom of the search bar is a link: 'Go to: advanced search | favorites | forms | non-catalog form | quick order'.

The screenshot below is an example of how the form looks in eProcure.

**Non-Catalog Form**

Available Actions: Add and go to Cart **Go** **Close**

**Supplier Info**

Enter Supplier  or supplier search

If your purchase is over \$10,000 and you are not using a State-contracted vendor, it will need to be bid out. Please use "NEEDSBID" as your vendor

If your vendor is a new vendor, please:

- Select (by typing) "UNKNOWN" in the Supplier box, and
- Fill out the [New Supplier Request or Change Form](#) along with the company's IRS W-9 Form and attach them to your order in the checkout

**General Info**

Product Description	Catalog No.	Quantity	Estimated Price	Packaging (UOM)
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	EA - Each

254 characters remaining [expand](#) | [clear](#)

**Product Details**

Commodity Code  [search...](#)

Manufacturer Name

Manufacturer Part No

Health and Safety

Controlled substance  
 Recycled  
 Hazardous material  
 Radioactive  
 Rad Minor  
 Select Agent  
 Toxin  
 Energy Star  
 Green

Total 0.00

**The fields highlighted in yellow are required to place an order.**

On the form, enter the name of the supplier, a description of the good or service, quantity requested, the price estimate per item, how the item is packaged and finally the commodity code of the item or service. Complete other fields as applicable and as the information is readily available.



**Do not confuse Quantity and Packaging!**

For example, an order is for 2000 widgets that are packaged in lots of 500. Enter a quantity of "4", "500" in the packaging field, and select "Lot" for the UOM from the drop-down menu.

Search for commodity code of the good or service by clicking on the [search](#) link next to the commodity code text box. This will open a search window in which the user can search for the commodity code by using a partial number, full number or description.

The screenshot shows a search interface titled "Commodity Code Search". It has two input fields: "Code starts with..." and "Description contains...". A "Search" button is at the bottom. A "Close" button is in the top right corner. The URL in the address bar is https://solutions.sciquest.com/apps/Router/CommodityCodeSearchPopup?ElementId=Line\_Re

Commodity codes are standard classification codes for products and services used to detail where money is spent within an organization. It describes the item being purchased. For example, if purchasing software, the commodity code would describe the type of software (e.g. charting software, accounting software).

After identifying the appropriate code, click on the *select* link to the right of the description and the commodity code will appear within the field on the Non-Catalog Form.

**At the end of this manual are “cheat sheets” for the most frequently used codes.**

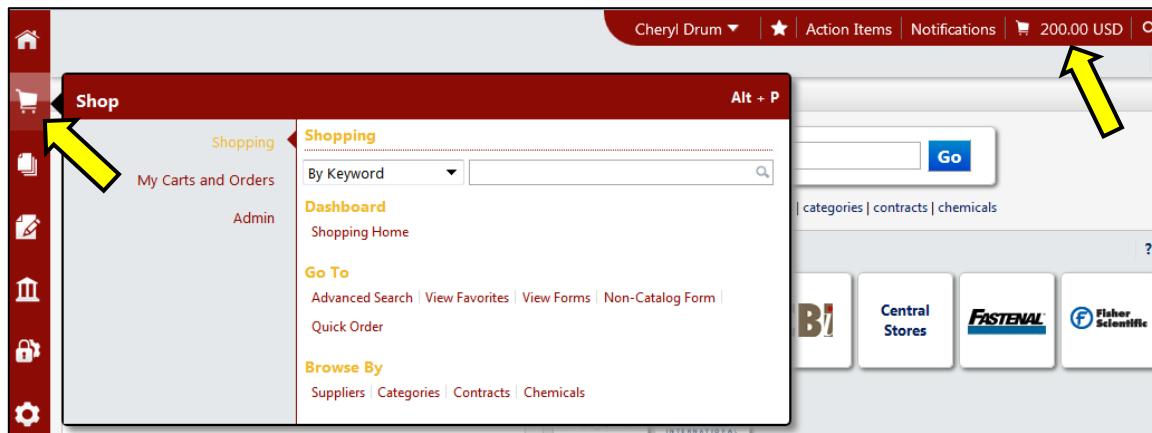
To add multiple line items or services to the order from the same supplier, click on the “Available Actions” drop-down menu, choose “Add to Cart and Return”, and click the Go button.

Remember to add an additional line item for shipping goods/equipment. If the freight charge is not on the quote, estimate the charges to be 10 – 15% of the total cost.

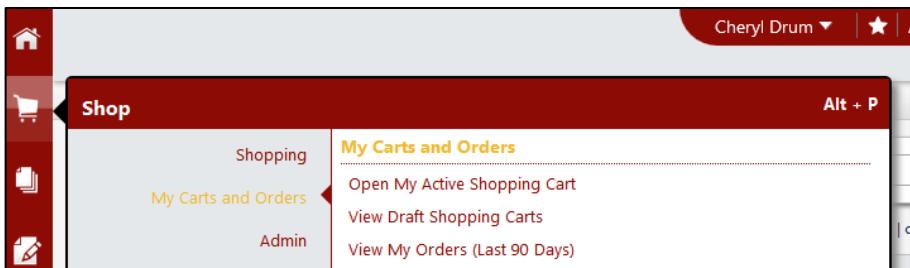
If finished with the order, choose “Add and go to Cart” from the drop-down menu and click the Go button. This action will open the shopping cart and all the line items entered.

# Shopping Carts

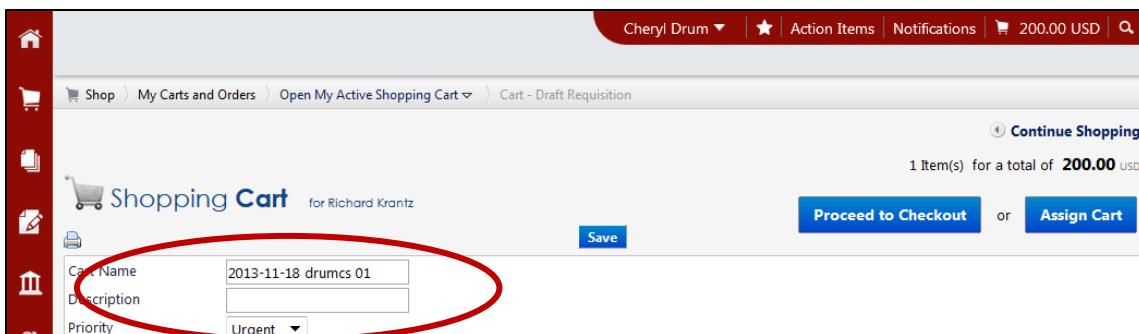
The shopping cart is where items reside until the user is ready to submit the cart to become an order. Access active, draft and assigned carts by clicking on the shopping cart icon on the left menu bar or by clicking in the cart area at the top right-hand corner of the homepage (see yellow arrows).



Opening the *carts* tab will generate several options. Click on the *My Carts and Orders* from the menu list. From here, select the active cart, view draft carts or previous orders.



Clicking on *Open My Active Shopping Cart* will open the active cart. Each cart that is created will be named <today's date> + <username> + 01 (02, 03...). Any shopping cart can be renamed by typing over the default name in the *Cart Name* text box (blue circle).



**Be sure to click the Save button when finished renaming the cart!**

## Managing Carts

It is possible to have multiple carts at one time (screenshot below). To create a new cart, click on the *View Draft Shopping Carts* line from the *My Carts and Orders* Menu. This will list all of the user's draft shopping carts. The active cart is identified with a red shopping cart icon (☒) instead of white (☐).

Carts can be deleted if no longer needed. Simply click on the *Delete* button (red circle) to the far right of the cart.

To create a new, empty shopping cart, click on the *Create Cart* (black circle) button at the top left-corner of the screen. This cart will now become the active cart. The user can make any draft cart the active cart by clicking on the shopping cart icon next to the name of the desired shopping cart.

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
☒	2013-03-19 drumcs 01	3/19/2013		4,758.66 USD	<input type="button" value="Delete"/>
☒	2013-11-08 drumcs 01	11/8/2013		1,057.02 USD	<input type="button" value="Delete"/>
☒	2013-11-18 drumcs 01	11/18/2013		200.00 USD	<input type="button" value="Delete"/>
☒	2014-01-16 drumcs 01	1/16/2014		0.00 USD	<input type="button" value="Delete"/>

## Managing Items in the Cart

Occasionally, a user may need to delete or move items within a shopping cart. To do so, open up the shopping cart by clicking on the *Shopping Cart Name* hyperlink. (See screenshot next page)

Find the line(s) that need to be changed or deleted and place a check mark in the checkbox on the right-hand side of the line (red oval).

Next, select an option from the "For selected line items" drop-down menu. Once the desired action is selected, click on the *Go* button next to the drop-down menu for the request to process (red rectangle).

Cheryl Drum | Action Items | Notifications | 200.00 USD | [Shop](#) > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Requisition

[Continue Shopping](#)

1 Item(s) for a total of **200.00 USD**

**Shopping Cart** for Richard Krantz

Save [Proceed to Checkout](#) or [Assign Cart](#)

Cart Name	2013-11-18 drums 01
Description	
Priority	Urgent

**Supplier / Line Item Details**

Show line details [For selected line items Remove Selected Items](#) [Go](#)

**FIRSTWATCH** more info... Contract: no value  
PO Number: To Be Assigned

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>
1 Annual maintenance and support fee for initiation of the First Watch Trigger for notification and deployment of College of Charleston Public Safety and Fire and EMS . The Trigger will be based off of data currently included in the Chas Cty 911 dispatch. <a href="#">more info...</a>	1/EA	200.00	1 EA	200.00 USD	<input checked="" type="checkbox"/>	

Supplier subtotal **200.00USD**

Alternately, if only deleting items from the active shopping cart, the user can click on the active cart icon at the top-right hand corner of the home/shop page.

Cheryl Drum | Action Items | Notifications | 200.00 USD | [Shop](#) > Shopping > Dashboard > Shopping Home > Home/Shop

**My Cart** 2013-11-18 drums 01

**Annual maintenance and suppor...** Quantity: 1 [View My Cart](#) [Checkout](#)

Price: 200.00 USD **200.00 USD**

Go to: advanced search | favorites | forms | non-catalog form

From this screen, click on the trash can (black circle) next to the item to be deleted. Also, from this screen, the user can proceed to the check-out process or view the shopping cart.

## Favorites

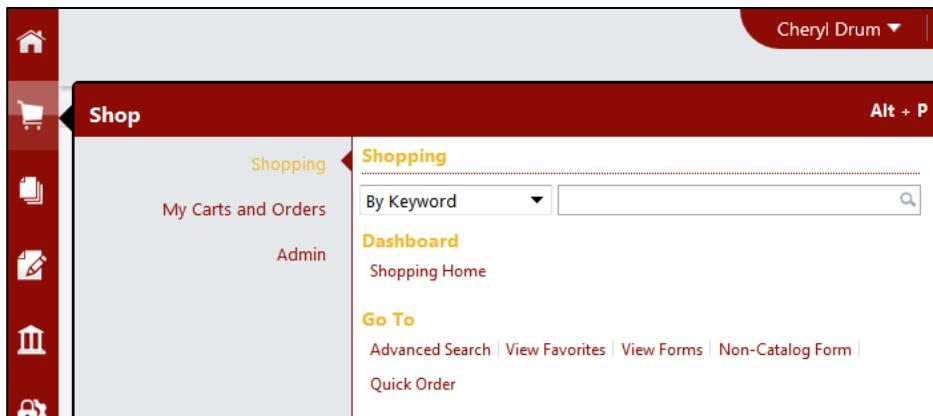
Favorites are shortcuts to frequently used items or forms. The user's favorites can be accessed through the **favorites** link below the Shop search field on the home/shop page.

Cheryl Drum | Action Items | Notifications | 0.00 USD | [Shop](#) > Shopping > Dashboard > Shopping Home > Home/Shop

**Shop** Everything [Go](#)

Go to: advanced search | **favorites** | forms | non-catalog form | quick order   Browse: suppliers | categories | contracts | chemicals

Or, click on the *Shopping Cart* icon. Select *View Favorites* from the *Go To* sub-menu.



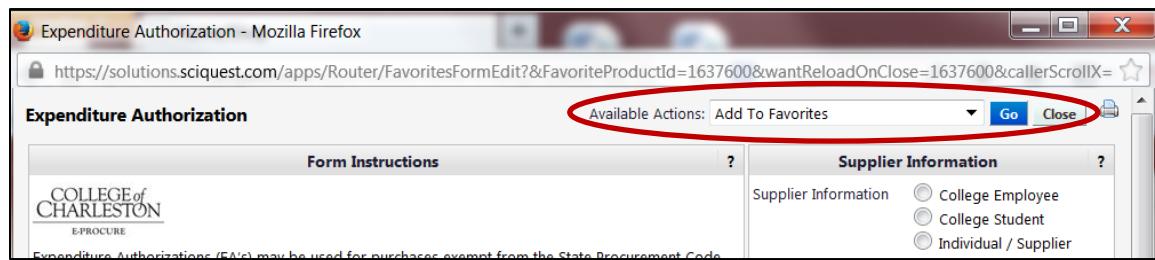
The following types of items or requests can be saved as favorites:

- Hosted items
- Punch-out Items (limited, few suppliers support this feature)
- Non-Catalog items
- Populated Forms (such as an Expenditure Authorization)

There are multiple ways offered throughout eProcure to add an item to the favorites list. See the following screenshots for examples of these options. From the search results:



From a form:



Within the shopping cart:

The screenshot shows the 'Shopping Cart' page for Cheryl Drum. At the top, there are navigation links: Shop, My Carts and Orders, Open My Active Shopping Cart, and Cart - Draft Requisition. The total value is listed as 4,758.66 USD. Below this, there are fields for Cart Name (2013-03-19 drumscs 01), Description, and Priority (Normal). A 'Save' button is present. To the right are 'Proceed to Checkout' and 'Assign Cart' buttons. A red circle highlights a dropdown menu labeled 'For selected line items' with options 'Add To Favorites' and 'Go'. The main content area displays 'Supplier / Line Item Details' for APPLE COMPUTER INC. It includes a link to their website, a note about item retrieval from their website, and a message about changes made. Below this is a table of line items:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	checkbox
1 IPAD AIR SMART CASE BLACK-USA	MF051LL/A	EA	79.00	1 EA	79.00 USD	<input checked="" type="checkbox"/>
				Supplier subtotal	79.00USD	

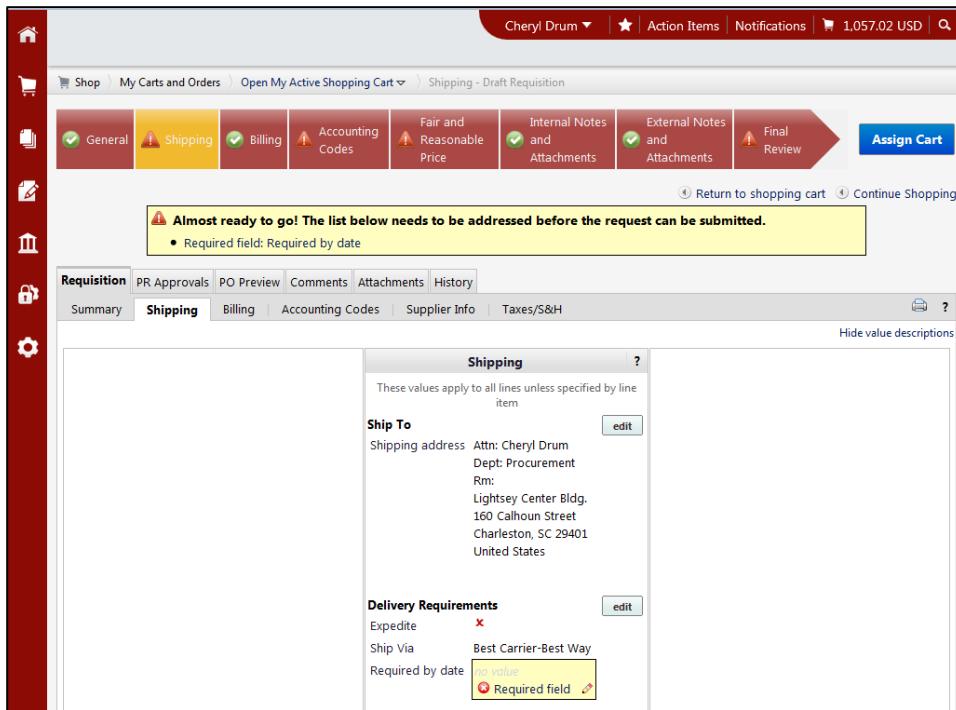
Using any of these options will launch a new window which asks the user to specify a nickname for the item and a destination folder. If a personal folder is not already set-up, click on the New button and follow the prompts.

This is a modal dialog box titled 'Add To Favorites'. It has two main sections: 'Step 1: Edit Item Details' and 'Step 2: Select Destination Folder'. In Step 1, there is a field for 'Item Nickname' (Expenditure Authorization) with a quantity of 500. In Step 2, there is a 'New' button and a tree view for selecting a destination folder. The 'Personal' folder is expanded, showing 'My Favorites'. The 'Shared' folder is also expanded, showing 'Apple Software', 'Forms', 'Microsoft Office Licenses', and 'Xerox Renewal'. At the bottom are 'Submit' and 'Cancel' buttons.

## Checking Out

Once all desired goods and services are added to the cart, it is ready to be submitted to become an order. **If a user has only Shopper permissions, the cart must be assigned to a Requisitioner to submit the cart for ordering.**

To begin, open the active cart and click on the *Proceed to Checkout* button. This will bring the user to the following screen:



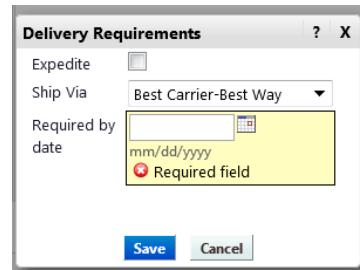
The green progress arrow bar on the top alerts the user to any incomplete information in the order. The symbol means that there is a required field that is missing. Once all fields have been completed, the warning will change to a symbol, indicating that the user is clear to proceed.

## Shipping Information

In the above screenshot, the Shipping information and Accounting Codes need to be added before the order can be submitted. To edit the Shipping information, click on the area of the progress arrow. Click on the blue *edit* button or and follow the prompts to change this address. Please note that eProcure will default to the user's ship-to location created in the user's profile and the attention message regarding the ship-to location will not be generated.

**Do not forget to change the ship-to location if not shipping it to the default address!**

The delivery requirement is also a mandatory field. This is information that is sent to the supplier. Click on the blue *edit* button in the Delivery Requirements section of the Shipping box. Use the calendar next to the *Required by date* field to ensure accurate date formatting.



## Billing

By default, eProcure is setup to pay for purchases through Accounts Payable via the use of a Purchase Order. However, a PCard can be used to pay for the purchase instead. To make this election, click on the Billing section of the progress bar.

If the “No credit card has been assigned” message is underneath the “Credit Card Info” section, then the order will not be paid via a PCard.

If the credit card information is in that section but the PCard will not be used to pay for this order, click on the blue *edit* button and then choose the blue *Clear* button in the pop-up box.

Click on the blue *edit* button next to “Credit Card Info”. eProcure allows the user to either enter a new credit card or to choose from a card already stored in the user’s profile.

Complete the fields below to enter your credit card information for this order.  
Or to add a new credit card, [click here](#)

**Card Details**

Cardholder Name:

Card Number:

Card Security Code:

Expiration Date:  2014

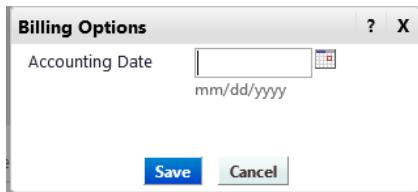
**Credit Card Info**

Save Cancel Clear

## Choosing a Fiscal Year

Click on the Billing section of the progress bar. To place an order against the next fiscal year, click on the blue *edit* button next to *Billing Options* (see above screenshot).

A pop-up box will appear that allows the user to choose an “Accounting Date.”



Anything after June 30<sup>th</sup> of the current fiscal year will set the order to be paid from the next fiscal year's budget.

***Please note that it is not necessary to fill in this information for orders being paid from the current fiscal year's budget, only the next fiscal year.***

## Sales Tax

eProcure will add sales tax to shopping carts containing items from hosted and punch-out catalogs. If creating the shopping cart using the Non-Catalog Form, check the “Taxable” checkbox if purchasing goods or equipment.

A screenshot of the "Non-Catalog Form" interface. It includes sections for "Supplier Info" (with a search bar), instructions for new vendors, and a "General Info" table. The "General Info" table has columns for Product Description, Catalog No., Quantity, Estimated Price, Packaging (UOM), and checkboxes for Taxable and Capital Expense. A red circle highlights the "Taxable" checkbox.

## Accounting Codes

**Accounting codes must be completed for every order.**

There are two fields in the Accounting Codes section, Index and Account.

- **Index** is the **fund** number the order is charged against
- **Account** is the broad **expense** category describes the good or service

The screenshot shows a user interface for managing accounting codes. At the top, there are several tabs: General, Shipping, Billing, Accounting Codes (which is highlighted in yellow), Fair and Reasonable Price, Internal Notes and Attachments, External Notes and Attachments, and Final Review. Below these tabs, a yellow warning box displays the message: "Almost ready to go! The list below needs to be addressed before the request can be submitted." It lists two required fields: "Account" and "Index". The main content area is titled "Accounting Codes" and contains two input fields: "Index" and "Account". Both fields have a red "Required field" validation message. There are also links for "Select from profile values..." and "Select from all values...". At the bottom right of the dialog, there is a blue "edit" button.

Click on the blue edit button to enter the index and account numbers. If the number is unknown, the user can search for this information either by number or by the alpha description. Click on the *Select from all values* link to start the search.

This screenshot shows the "Accounting Codes" dialog box. It has two main sections: "Index" and "Account". Both sections contain a text input field with a red "Required field" validation message. Below each input field is a link: "Select from profile values..." and "Select from all values...". At the bottom of the dialog are "Save" and "Cancel" buttons.

Type the description of the index in the field and click the blue Search button.

This screenshot shows the "Custom Field Search" dialog box. It has two input fields: "Value" and "Description". The "Description" field contains the value "Procurement". A blue "Search" button is located at the bottom right.

View the results and select the correct index.  
This will automatically populate the field with the user's selection.

This screenshot shows a search results table. The header includes "Click to filter search results", "Results per page" (set to 20), "Values Found 1", and "Page 1 of 1". The table has two columns: "Value" and "Description". One row is shown, with "Value" being "110016" and "Description" being "Procurement". A blue "select" button is located at the bottom right of the table.

**Be sure to click the Save button when finished!**

It is possible for a user to save index-account code combinations in their profile. These combinations can be given a nick-name. During the check-out process, the user can select the appropriate combination from the code favorite's drop-down menu. This will populate both the index and the account code.

This will not work for all purchases, but will save time for those frequent purchases.

The screenshot shows a 'Accounting Codes' dialog box. At the top, there's a dropdown menu labeled 'Select from your code favorites' with 'Office Supplies' selected. Below it is a table with two rows. The first row has 'Index' (dropdown) and 'Account' (dropdown) fields, both with 'Required field' validation errors. The second row is empty. At the bottom are 'Save' and 'Cancel' buttons.

## Splitting Orders

It is possible to split an order between different indexes, either per order or per line item.



*Splitting an order between indexes requires that the cart be assigned to a buyer in the Procurement Office instead of placing the order; otherwise the order will reject.*

To add an accounting code split for the whole order, click on the *add split* link in the Accounting Codes pop-up window:

The screenshot shows the same 'Accounting Codes' dialog box as before, but now with a split entry. The first row has 'Index' (110016) and 'Account' (720140), both with 'Required field' errors. To the right, there's a dropdown menu for '% of Price' with '0' selected, and an 'add split' link which is circled in red. The second row is empty. At the bottom are 'Save' and 'Cancel' buttons.

This will add an additional line that will allow the user to change both the Index and the Account. Orders can be split by percentage of the subtotal of the order, percentage of the quantity of the order or by a specific dollar amount. The drop-down menu to the left of the *add split* link dictates how the split will be applied.

**Please note that when adding a per-order accounting code split, that a per item accounting code split cannot also be added.**

To split accounting codes per item, scroll down to the "Supplier/Line Item Details" section and click on the blue *edit* button next to the item that needs specific accounting codes.

Product Description		Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1	MS Office for Mac License  <a href="#">more info...</a>		1/EA	42.07	1 EA	42.07 USD	<input type="checkbox"/>
<b>Accounting Codes</b>							
 values have been overridden for this line							
	Index		Account				
	110016		770114				
	Procurement		Software Purchase				
<a href="#">copy to other lines</a>							
						<b>Supplier subtotal</b>	42.07
						Tax1	0.00
						Tax2	0.00
						<b>Supplier total</b>	42.07 USD
<b>OFFICE MAX CONTRACT INC</b> <a href="#">more info...</a>							
Product Description		Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
2	HP LJ PRO M451DN  <a href="#">more info...</a>	M3CE957A#BGJ	EA	637.00	1 EA	637.00 USD	<input type="checkbox"/>
<b>Accounting Codes (same as header)</b>							
							
						<b>Supplier subtotal</b>	637.00
						Tax1	54.15
						Tax2	0.00
						<b>Supplier total</b>	691.15 USD

Change the accounting codes in the subsequent pop-up box. Note that it is possible to split the accounting codes within a single item as well. To do so, click on the *add split* link and follow the same procedure as above.

## Fair & Reasonable Price

SC Procurement Laws state that purchases up to \$10,000 must be deemed and certified “fair and reasonable” by the purchaser. This certification must be made on every order in eProcure.

Shop My Carts and Orders Open My Active Shopping Cart ▾ Fair and Reasonable Price - Draft Requisition

✓ General ✓ Shipping ✓ Billing ⚠ Accounting Codes ⚠ Fair and Reasonable Price ✓ Internal Notes and Attachments ✓ External Notes and Attachments ⚠ Final Review Assign Cart

⚠ Almost ready to go! The list below needs to be addressed before the request can be submitted.  
 • Required field: Do you certify this purchase is fair and reasonable?

<span style="color: red;">⚠</span> Requisition	PR Approvals	PO Preview	Comments	Attachments	History	<span style="color: blue;">Hide value descriptions</span>
Summary	Shipping	Billing	Accounting Codes	Supplier Info	Taxes/S&H	<span style="color: blue;">Print</span>

**Fair and Reasonable Price** ?

These values apply to all lines unless specified by line item

If requisition is under \$10,000, you must certify the price is fair and reasonable edit

Do you certify this purchase is fair and reasonable? no value Required field

To make this certification in eProcure, answer yes/no using the dropdown box on the Fair and Reasonable screen:

If requisition is under \$10,000, you must certify the price is fair and reasonable ? X

Do you certify this purchase is fair and reasonable?

Required field

## Internal / External Notes and Attachments

Both the Notes and Attachment screens allow input of a personalized note or attachment of a file (such as a PDF, an Excel spreadsheet, etc.). Like it sounds, Internal Notes and Attachments can only be viewed internally at the College, however External Notes and Attachments will be sent to the supplier.



*External Notes and Attachments are seen by the supplier **only** when ordering Non-Catalog items. Hosted and Punch-out Suppliers **cannot receive** external notes or attachments.*

## Final Review

Once every section in the progress bar is complete, the last step is to review the *Final Review* screen to ensure all of the order information is complete and accurate. It is at this step that a cart may either be assigned to or be submitted for ordering by a Requisitioner.

To submit the cart, click on the blue *Place Order* button (see screenshot next page).

If the *Place Order* button is not visible, the user is not a requisitioner and must assign the cart in order for it to become a requisition and eventually a purchase order. Click on the *Assign Cart* button to assign the cart to a Requisitioner. This action will open a pop-up window, allowing the user to choose another employee who has the role of Requisitioner and assign the cart to them.

From this window, search for the desired assignee or select from a previously added list of Cart Assignees (this list can be created in the user's profile settings). A note to the assignee can be added at this screen as well. Click on the *Assign* button to send the cart to the Requisitioner for approval. The Requisitioner will receive an email notification that a cart has been assigned and is awaiting action.

# Approving

Requisitioners and Approvers will need to approve orders from time to time. eProcure is set-up so that when an approval is required; an automated email is generated and sent to all available approvers. There are two ways to access pending approvals after logging into eProcure.

The first step is to go to the Action Items box, which is located on the top right-hand section of the main page next to your user name. Clicking on the *Action Items* link in this box will expand the menu, showing everything that is waiting for the user's attention.



The other way to access approvals is via the *Orders & Documents* menu from the Main navigation bar. Select *Approvals* and then *My Approvals* from the menu.



Clicking on either the navigation bar or the *Action Items* link will bring you to a page that looks like the following screenshot:

A screenshot of the "Approve/Complete" page. At the top, it says "Total Results Found: 7" and "All Dates". Below that is a table with columns: Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, Amount, and Action. One row is highlighted with a red oval: "46917870 DAKTRONICS Not Assigned 2/3/2014 12:08 PM Joshua Bryson 9,765.00 USD Assign". To the left of the table is a sidebar titled "Filtered By" with sections for Type (Requisition), Date Range (All Dates), View Approvals For (Stephen Osborne), Filter My Approvals (Type: Requisition, Date Range: All Dates), and Folders (Index: 170026 (PP Special Projects)). The table also includes a "Sort by" dropdown set to "Submit date newest first", a "Results per folder" dropdown set to 20, and a "Hide requisition details" link.

To approve an order that does not need any modification:

1. Expand the shared workflow folder by clicking on the folder name. In the above screenshot, the folder entitled “Index: 210040 (TD Arena Rental Operating): (5,000 – 9,999,999.99) USD” is opened.
2. In the expanded folder, orders that need your approval or that can be assigned to someone (including yourself – see the My PR Approvals section below) appear. Tick the checkbox next to the requisition(s) to be approved.
3. Choose “Approve/Complete” from the drop-down menu and click on the Go button.

## My PR Approvals

Approval folders in eProcure are usually shared among several approvers. It is possible to approve an order directly from the shared folder – as the above directions show how – but it is also possible to assign an order directly to someone. When that occurs, only that person can approve the order, and the order will show in both the shared workflow folder and also in the assignee’s personal folder - “My PR Approvals”.

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
47240657	NEEDSBID	Phil Stevenson	2/4/2014 11:37 AM	Paty Cowden	18,000.00 USD	<a href="#">Approve</a>

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
47240657	NEEDSBID	Phil Stevenson	2/4/2014 11:37 AM	Paty Cowden	18,000.00 USD	<a href="#">Assign</a>

Clicking on the blue *Assign* button in a shared workflow folder assigns that order to the user’s own “My PR Approvals” folder. From there, click on the blue *Approve* button to approve it. This accomplishes the same thing as approving it directly from the shared folder as shown above.

The order can also be assigned to someone else by ticking the checkbox next to the order and using the “Assign” option from the drop-down menu. To un-assign an order from “My PR Approvals”, tick the checkbox next to the order and choose “Return to Shared Folder” from the drop-down menu. Click the blue Go button to complete the action.

## Approving Via Email

It is also possible to approve orders via an email order approval notice. This is a secure, fast and easy way to approve orders - even from off-campus. Users with approval authority can enable this feature by first navigating to their user profile. Then select the *User's Name, Phone Number, Email, etc.* from the *User Information and Settings* menu.

The screenshot shows the eProcure User Profile interface. On the left is a vertical toolbar with icons for Home, Shopping Cart, My Profile, User Information and Settings (which is selected), User Profile and Preferences, Manage Users, and Help. The main content area has a header for Cheryl Drum. Below the header, the 'User's Name, Phone Number, Email, etc.' section is displayed. This section includes fields for First Name (Cheryl), Last Name (Drum), Phone Number (1 843 9532756), E-mail Address (drumcs@cofc.edu), Department (Procurement (Procurement)), Position, Badge Id, User Name (drumcs), and a password recovery question/answer pair. At the bottom of this section, there are fields for Authentication Method (Local) and Email Approval Code (\*\*\*\*\*). A red box highlights the 'Email Approval Code' field. A blue 'Save' button is located at the bottom right of the form.

**Be sure to click the Save button when finished!**



*The approval code must be at least six characters long.*

A *Take Action* button will now appear within the approval email.

The screenshot shows an approval email. At the top, it displays a total amount of 4,541.74 USD. Below this is a section titled 'Accounting Codes' with fields for Chart (1), Index, and Account (720132 - Data Processing Equipment - Tagged). At the bottom of the email, there is a message: 'Ready to approve, reject or assign this document to yourself?'. To the right of this message is a yellow rectangular button with the text 'Take Action' in black. This button is circled with a red oval.

Click on this button to open a secure website that will offer the following options:

- approve,
- reject, or
- return the order to the requisitioner

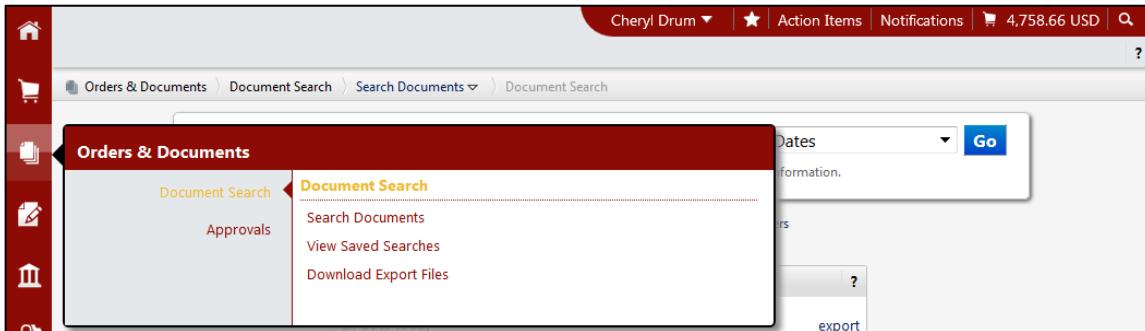
Procurement Office, College of Charleston	
Requisition	22777690
Status	Pending
Shopper	Amy Solomon
Approver	Wendy Williams
Select an action:	
<input type="radio"/> Approve	
<input type="radio"/> Assign to myself	
<input type="radio"/> Reject	
<input type="radio"/> Return to Requisitioner	
Comment (Optional):	
<input type="text"/>	
Enter your approval code to submit:	
<input type="text"/>	<input type="button" value="Submit"/>

Enter any comments on this order in the comment field. This is especially useful when an order is rejected or returned to the requisitioner. After choosing the appropriate action, the user will enter their unique approval code and click the *Submit* button.

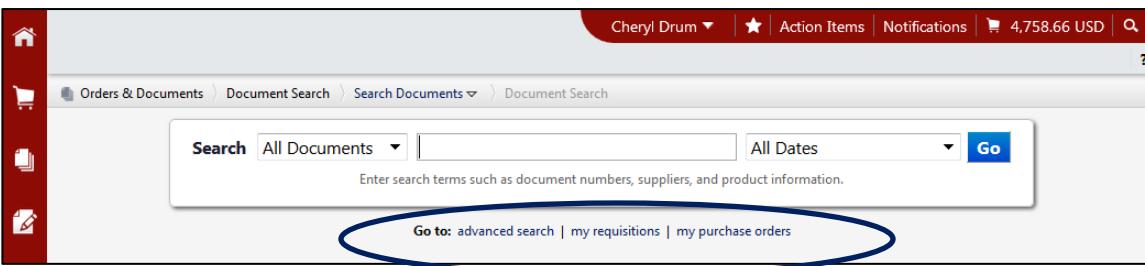
eProcure will generate one more confirmation pop-up box. After this box is answered, the approval process is complete!

## Document Search

The *Orders & Documents* menu will open up a search menu to search for requisitions and purchase orders. Searching this way is fast, flexible and can be customized. Click on the *Document* icon in the left navigation bar.



Click on *Search Documents* from the menu. This will open the following Search engine:



Located below the search box are links to ***my requisitions*** and ***my purchase orders***. Clicking on these links is the fastest way to find a user's orders from the last 90 days. The default search box is pictured above and it offers a few options in the drop-down menus.

If these options are not specific enough, conduct an *advanced search* by clicking the link in the Go To links. Pick from any option listed or combine multiple search criteria.

The screenshot shows the 'Document Search' page within the eProcure system. On the left is a vertical toolbar with icons for Home, Shopping Cart, Documents, and Settings. The main area has a breadcrumb trail: Orders & Documents > Document Search > Search Documents > Document Search. A 'Go to:' link at the top right provides links to simple search, my requisitions, and my purchase orders. The search form includes a dropdown for 'Search' (set to 'All Documents') and a search term input field containing 'simple search'. Below this are sections for 'General Document Identification' (Document Number(s)), 'Document Information' (Participant(s), Owner, Date, Total Amount, Supplier, Department), and 'Item/Product Information' (Catalog Number(SKU), Product Description, Product Flags). The product flags section lists various categories with checkboxes: Controlled substance, Energy Star, Green, Hazardous material, Rad Minor, Radioactive, Recycled, Select Agent, and Toxin. A 'Go' button is located at the bottom of the search form. Another 'Go to:' link at the bottom right provides links to simple search, my requisitions, and my purchase orders.

## Receiving Orders

eProcure will send out an automated reminder email after the order is complete stating that a receipt is required once it has arrived (or services have been rendered). A receipt must be created in eProcure when goods/services are received.

First, locate the purchase order by clicking on the *Document Search* tab, then *my purchase orders* or by searching for the purchase order(s).

The screenshot shows the 'Document Search' page within the eProcure system. The layout is similar to the previous one, with a vertical toolbar on the left and a breadcrumb trail at the top. The search form includes a dropdown for 'Search' (set to 'All Documents'), a search term input field, a date range dropdown set to 'All Dates', and a 'Go' button. Below the search form is a placeholder text: 'Enter search terms such as document numbers, suppliers, and product information.' At the bottom of the search form is another 'Go to:' link providing links to advanced search, my requisitions, and my purchase orders.

Once the appropriate purchase order is identified, select the check box next to the purchase order total. Then, open the drop-down menu above the search results and select either “Create Quantity Receipt” or “Create Cost Receipt.”

The screenshot shows a search results page for purchase orders. The search terms are "My Purchase Orders Search" and the owner is "Phil Stevenson". The results show one item: PO008724 from GOVCONNECTION INC. The receipt status is "Sent". A dropdown menu at the top right of the results table includes options for "Create Quantity Receipt", "Create Cost Receipt", and "Create Cost Receipt".

Create a *Quantity Receipt* for tangible goods and a *Cost Receipt* for services. In the above example, the *Quantity Receipt* is selected. Click the Go button to open the receipt box.

On this screen, complete any relevant information regarding the order under the *Receipt Summary* section (*Header Information* section is optional). Refer to the screenshot below. If all items were received as ordered, simply click on the *Complete* button.

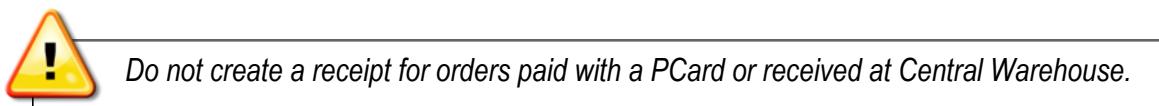
If only part of the order was received, create a partial receipt by entering the actual quantity of items that were delivered. Create another receipt(s) for subsequent deliveries until the purchase order is fully received.

This screenshot shows the "New Qty Receipt" interface. The "Header Information" section includes fields for Receipt Name (2014-01-21 drums 01), Receipt Create Date (1/21/2014 11:18:05 AM), and Source (Manual). The "RECEIPT ADDRESS" section contains delivery details for Cheryl Drum. The "Receipt Lines" section lists three items from PO0017899:

PO No.	Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0017899	1	0100 8,000 Page Yellow Toner Cartridge for Dell 5100n Color Laser Printer	310-S808	2 EA		2	Received	Received	<input type="checkbox"/>
P0017899	2	0200 9,000 Page Black Toner Cartridge for Dell 5100n Color Laser Printer	310-S807	3 EA		3	Received	Received	<input type="checkbox"/>
P0017899	3	0300 120 V Fuser Kit for Dell 5100n Color Laser Printer	310-B727	2 EA		2	Received	Received	<input type="checkbox"/>

Please note that an item can also be marked as *Returned* or *Cancelled*, if applicable. When finished, click on the *Complete* button and a screen similar to the one below will appear. This is the final screen in the creating receipts process.

The screenshot shows a user interface for document management. At the top, there's a navigation bar with icons for Home, Orders & Documents, Document Search, and a dropdown for Cheryl Drum. Below the navigation is a search bar with the text "Receipt No.6936338". Underneath the search bar are two buttons: "Create Qty Receipt" and "Create Cost Receipt". A message box displays: "Receipt No . 6936338 has been created for the following PO No(s):" followed by a bullet point: "• PO/Reference No. P0017899". On the left side of the main content area, there's a vertical sidebar with icons for Home, Shopping Cart, and other document-related functions.



## Correcting Receipts

On occasion, it may be necessary to modify a receipt to correct inaccuracies. To make corrections to an existing receipt, first search for, locate and open the Purchase Order using the methods listed in the above section, *Document Search*.

Locate the *Receipts* tab within the purchase order:

The screenshot shows a detailed view of a purchase order. At the top, the PO/Reference No. is listed as "P0017736 Revision 0" and the Supplier is "GOVCONNECTION INC". The "Receipts" tab is highlighted with a red circle. Below the tabs, there's a table titled "Receipts" with columns for Receipt No., Receipt Date, Receipt Type, and Received by. The data shows a receipt for "6935113" on "1/21/2014" with a quantity of "Quantity" and "Received by" "Branton, Matthew". Below this is a table titled "Receipt Line Details" with columns for No, Product Name, Catalog No., Unit Price, Qty/UOM, Extended Price, Qty / Cost (In), Qty / Cost (Out), and Status. One row is shown for "1" with "HP DAT 160 Data Cartridge 160GB" and "7740280". The status is "Net Received". The left sidebar contains icons for Home, Shopping Cart, and other document-related functions.

The "Receipt No.", the date it was created, the type of receipt and finally who received the order will be visible. To modify the receipt, click on the Receipt No. This will open up the receipt.

Click on the *Reopen Receipt* button to make changes.

The screenshot shows the 'Header Information' section of a receipt. It includes fields for Receipt Name (2014-01-21 brantonm 02), Receipt Create Date (1/21/2014 10:02:49 AM), Complete Date (1/21/2014 10:02:52 AM), Source (Manual), and other details like Receipt No (6935113), Receipt Date (1/21/2014), Packing Slip No., Supplier Name (GOVCONNECTION INC), and Received by (Matthew Branton). The 'Reopen Receipt' button is located in the top right corner of the header area.

eProcure will prompt the user to verify the reopening of the receipt. Answer "Ok", and supply the reason for modifying the receipt in the comment box, i.e. over received. The receipt reopens for editing, see screenshot below.

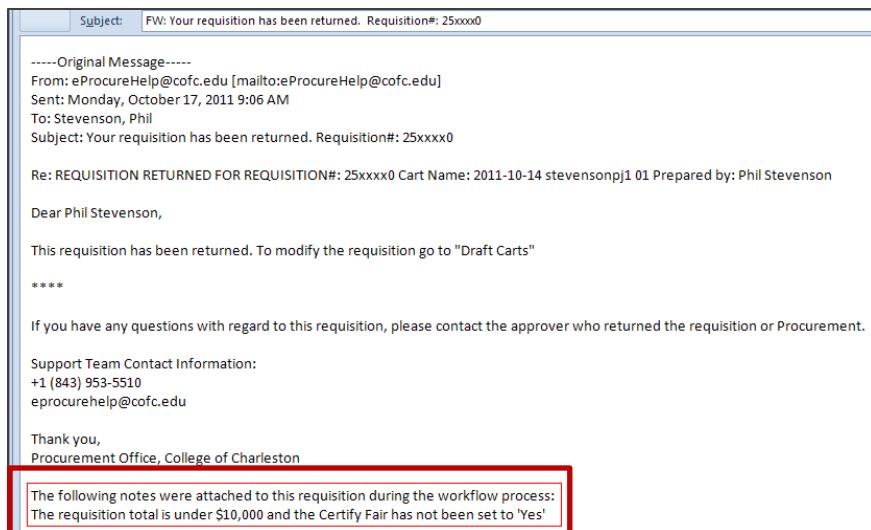
The screenshot shows the 'New Qty Receipt' screen. It includes fields for Receipt Name (2014-01-21 brantonm 02), Receipt Create Date (1/21/2014 10:02:49 AM), Source (Manual), and other details like Receipt No (6935113), Receipt Date (1/21/2014), Packing Slip No., Supplier Name (GOVCONNECTION INC), and Received by (Matthew Branton). The 'RECEIPT ADDRESS' and 'DELIVERY' sections are also visible. The 'Save Updates' and 'Complete' buttons are highlighted with a red box at the top right. Below them, the 'Receipt Lines' section shows a single line item: PO No. P0017736, PO Line No. 1, Product Name HP DAT 160 Data Cartridge 160GB, Catalog No. 7740280, Qty/UOM ordered 1 EA, Previous Receipts 1, Quantity 1, Add to Inventory Received, Line Status, and Actions. Buttons for Delete, Add PO, Save Updates, and Complete are located at the bottom.

Change the receipt to modify the line items that have already been received, remove line item(s) or delete the receipt altogether by clicking on the *Delete* button on either the top or bottom of the screen.

The *Save Updates* button will save any changes within this screen, but in order for the edits to be submitted, the user must click on the *Complete* button!

# Your Requisition has been Returned

Occasionally, the user will receive an email stating that their requisition has been returned. This could happen for a variety of reasons – incorrect Accounting Codes being the most common reason. The email will describe the problem. Look for a section at the bottom of the email that begins with "The following notes were attached to this requisition during the workflow process."



The reason that the requisition was returned will be in this section, as well as instructions on how to modify and successfully submit the order.

If an order is returned, the cart is returned to the user's draft shopping carts. The user should open the cart and proceed to the checkout process, correct the error and resubmit the shopping cart.

# New Supplier Request or Change

Occasionally the supplier of the requested good/service may not have done prior business with the College of Charleston. Request a new supplier through eProcure using the *Non-Catalog Form*.

Non-Catalog Form

Available Actions: Add and go to Cart Go Close

Supplier Info

Enter Supplier  or [supplier search](#)

If your purchase is over \$10,000 and you are not using a State-contracted vendor, it will need to be bid out. Please use "NEEDSBID" as your vendor

If your vendor is a new vendor, please:

- Select (by typing) "UNKNOWN" in the Supplier box, and
- Fill out the [New Supplier Request or Change Form](#) along with the company's [IRS W-9 Form](#) and attach them to your order in the checkout

General Info

In the *Non-Catalog Form*, there are links (red box in above screenshot) to the required forms. The *New Supplier Request or Change Form* is an Adobe form that allows the user to complete the required information fields, save the document and attach it to the order.

Attach a copy of the company's W-9 (the IRS W-9 form is required by State and Federal law) and the completed *New Supplier Request or Change Form* to the shopping cart during the checkout process (internal attachments). These forms are also available on the Office of Procurement's website.



#### Avoid Delays!

If the completed W-9 and New Supplier Form are not attached to the order, it will stop in Procurement until they are received and processed.

## Placing an Order with the New Supplier

Even if the *New Supplier Request or Change Form* is attached to the order, it is still possible to place the order normally without having to wait for the new vendor to be set-up. To do so select the vendor named, "UNKNOWN", on the Non-Catalog Form. This is a temporary placeholder until the new vendor is set-up in both Banner and eProcure.

From here, fill out the form following normal procedures. Once the Office of Procurement has added the supplier, the order will be modified to show the new supplier and sent on through the approval process to create the requisition and subsequent purchase order.

***Only select the "UNKNOWN" vendor when requesting a new supplier. Selecting this option any other time will cause the order to fail.***

## Showcased Services

The Office of Procurement has added frequently used services to this centralized area on the home/shop page.

The screenshot shows a grid of six service buttons:

- Business Card Express
- Enterprise Rent-A-Car
- Expenditure Authorization
- PO Change Request
- Xerox Renewal Form
- Apple OS X Mountain Lion License

Business Card Express and Enterprise Rent-A-Car services contain additional information to place an order. Also included is the link to their website.

Xerox Renewal Form is used yearly to renew the contract for departmental Xerox multi-functional printers. This form is a template that should be used to ensure the proper information is captured and the purchase order can be processed. The College has a combined bill for the entire campus. There will only be one purchase order issued. Submitting this request will simply provide approval for the funds to be spent

Apple OS X Mountain Lion License. Use this pre-populated Non-Catalog Form to order a new license. Simply add it to a shopping cart, complete the check-out process, and place the order.

## Expenditure Authorization

This is the electronic version of the form on the Controller's website. Complete all required fields and attach all required documents to this form. This may include, IRS Form W-9, New Supplier Request/Change Form, signed registration form, etc.

When all fields are completed, add this form to an empty shopping cart. Take the shopping cart through the check-out process and place the order. After the necessary approvals have been secured (electronically), the requisition will be sent to the Controller's Office for final processing.

## PO Change Request

Occasionally, a purchase order needs to be modified after the purchase order number has been assigned and sent to the vendor. Use the PO Change Request form to:

- Increase/decrease the purchase order amount
- Add or delete line items
- Cancel the purchase order in its entirety
- Change accounting codes (index/account numbers)

The form can be found on the Home/Shop page under *Showcased Services*.

Complete the required fields (**bold**), add the form to an empty cart, and take the shopping cart through the check-out process similar to a normal purchase.

Upon electronic receipt of this request, a Procurement Officer will make the necessary changes to the purchase order. eProcure will generate a new requisition number for this shopping cart, but the changes to the purchase order can be found under the revisions tab in the original purchase order. Also, a receipt can only be created for the original purchase order and not for any subsequent changes. The Procurement Officer will request that these changes be "received" in Banner.

See the screenshot on the following page for an example of how the form looks.

**PO Change Request**

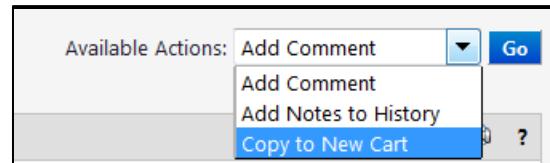
<b>PO Change Request Instructions</b>	<b>PO Change Request Details</b>
<p>Use this form to request a change to a Purchase Order that has already been sent to the supplier.</p> <p>In order to ensure proper handling of your request, you must do the following:</p> <ul style="list-style-type: none"> <li>• Complete this form by providing as much detail as possible regarding the requested change.</li> <li>• Enter the new PO Total if the change results in an increase in value. Enter the original PO total if this is a FOAPAL change only.</li> <li>• Enter the original FOAPAL values or new FOAPAL values in the Accounting Codes section of the shopping cart. If multiple FOAPALS are required, please click "add split" in the shopping cart to include additional FOAPAL strings as required. This will ensure proper approval review routing of this change request.</li> <li>• Please do not add this form to a shopping cart with an order to another vendor. It must be submitted by itself in its own cart.</li> </ul> <p>This form will be routed through the FOAPAL review process and then to Purchasing for the completion of the change request. Contact the Purchasing Department with any questions.</p>	<p>Please complete the fields below to describe the nature of this PO Change Request. Provide as much information as possible on this form to avoid delays in processing. Fields in <b>bold</b> are required.</p> <p><b>PO Number</b>: <input type="text"/></p> <p><b>Supplier Name</b>: <input type="text"/></p> <p><b>Type of Change</b>: <input type="text"/> Please select...</p> <p>Enter the original total and the new total cost of the reference PO (if applicable). If the value of the PO has increased, enter the new total (original value + increase). If the change is to FOAPALS only, enter the original value of the PO. Purchasing will not complete the change unless proper approval has been made for the new PO total.</p> <p><b>Current PO Total: \$</b>: <input type="text"/></p> <p>Increase PO By: <input type="text"/></p> <p>Decrease PO By: <input type="text"/></p> <p><b>New PO Total: \$</b>: <input type="text"/></p> <p>Capital Project: <input type="checkbox"/></p> <p>Taxable: <input type="checkbox"/></p> <p>Please describe the required PO change as well as justification for the change. Be specific in order to avoid any delays in processing. If there are changes to one or more lines on the PO, please include the line number and associated change for each.</p> <p><b>PO Change Request Details</b></p> <p>2000 characters remaining <a href="#">expand</a>   <a href="#">clear</a></p>
<b>Supplier Information</b>	
Supplier: Procurement Office	

# Helpful Tips and Tricks

## Copying Orders

It is possible to duplicate a previously placed order. This can be a real time saver! First find the requisition. Click on the *Orders & Documents* menu in the navigation bar and select *Search Documents* from the list. Enter the requisition number in the search field and click *Go*. If the requisition number is unavailable, search for the purchase order and open it. The requisition number is hyper-linked on the first tab of the purchase order.

From the *Requisition* tab within the requisition is an “Available Actions” drop-down menu (right side of the screen).



Choose “Copy to New Cart” from this menu and click on the *Go* button. Everything in that requisition will be copied to a new shopping cart (including any attachments) and placed into the user’s Draft Carts.

**Be sure to make any necessary changes to the new cart before submitting it for order!**

## Purchase Requisition (PR) Approvals Tab

Within a requisition there is a *PR Approvals* tab.

The screenshot shows the PR Approvals tab highlighted with a red box. The page displays a requisition for document number 46758847. On the left, there is a sidebar with various icons. The main area shows a flowchart of the approval process:

- Banner Budget Authorization:** Completed ✓ (by System)
- Fund Approval:** Approved ✓
- Procurement Review:** Active (Eric Clark, view approvers)
- Create PO:** Future ➔ (Expedite, Finish, Expedite buttons)

On the far left, there is a sidebar with the following information:  
Submitted by Jeremy Clement On behalf of James Kingston  
1/21/2014 1:29 PM

Click on the tab for a visual illustration of where a requisition is in the approval process (see above screenshot). In the above example, the fund expenditure for this requisition was approved and it is currently awaiting the next approval step (Procurement Review).

Alternately, view a historical accounting of the life of the requisition by clicking on the *History* sub-tab.

The screenshot shows the History sub-tab highlighted with a red box. The page displays a requisition for document number 46758847. The history section shows the following entries:

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
1/21/2014 2:53 PM	Michael Turner			Requisition forwarded		Michael Turner	Eric Clark	Eric, please review and process. Thanks
1/21/2014 2:53 PM	Michael Turner	Procurement Review		Requisition assigned				
1/21/2014 1:29 PM	Jeremy Clement	Fund Approval		Requisition step auto approved				
1/21/2014 1:29 PM	System	Banner Budget Authorization		Requisition approved				

# eProcure Cheat Sheets

## Commodity Families

Apparel/Luggage/Personal Care Products	53xxxxxx
Building/Construction Machinery & Accessories	22xxxxxx
Building/Construction Maintenance Services	72xxxxxx
Chemicals including Bio-Chemicals & Gas Materials	12xxxxxx
Cleaning Equipment & Supplies	47xxxxxx
Commercial/Military/Private Vehicles & Accessories/Components	25xxxxxx
Communications/Computer Equipment/Peripherals, Components & Supplies	43xxxxxx
Defense/Law Enforcement/Security/Safety Equipment & Supplies	46xxxxxx
Distribution/Conditioning Systems Equipment & Components	40xxxxxx
Domestic Appliances/Consumer Electronic Products & Supplies	52xxxxxx
Drugs/Pharmaceutical Products	51xxxxxx
Editorial/Design/Graphic & Fine Art Services	82xxxxxx
Education/Training Services	86xxxxxx
Electronic Components & Supplies	32xxxxxx
Engineering/Research/Technology Based Services	81xxxxxx
Environmental Services	77xxxxxx
Farming/Fishing/Forestry/Wildlife Contracting Services	70xxxxxx
Farming/Fishing/Forestry/Wildlife Machinery & Accessories	21xxxxxx
Financial/Insurance Services	84xxxxxx
Food/Beverage/Tobacco Products	50xxxxxx
Fuels/Fuel Additives/Lubricants & Anti-Corrosive Materials	15xxxxxx
Furniture & Furnishings	56xxxxxx
Healthcare Services	85xxxxxx
Industrial Cleaning Services	76xxxxxx
Industrial Manufacturing & Processing Machinery & Accessories	23xxxxxx
Industrial Production & Manufacturing Services	73xxxxxx
Laboratory/Measuring/Observing/Testing Equipment	41xxxxxx
Lighting/Electrical Accessories & Supplies	39xxxxxx
Live Plant & Animal Material & Accessories and Supplies	10xxxxxx
Management/Business Professionals/Administrative Services	80xxxxxx
Manufacturing Components & Supplies	31xxxxxx
Material Handling/Conditioning/Storage Machinery Accessories & Supplies	24xxxxxx
Medical Equipment, Accessories & Supplies	42xxxxxx
Mineral/Textile/Inedible Plant/Animal Materials	11xxxxxx
Mining Machinery & Accessories	20xxxxxx
Mining/Oil/Gas Drilling Services	71xxxxxx
Musical Instruments/Games/Toys/Arts & Crafts/Educ. Equip, Accessories & Supplies	60xxxxxx

National Defense/Public Order/Security & Safety Services	92xxxxxx
Office Equipment, Accessories & Supplies	44xxxxxx
Organizations/Clubs	94xxxxxx
Paper Materials & Products	14xxxxxx
Personal/Domestic Services	91xxxxxx
Politics/Civic Affairs Services	93xxxxxx
Power Generation/Distribution Machinery & Accessories	26xxxxxx
Printing/Photographic/Audio Visual Equipment & Supplies	45xxxxxx
Public Utilities/Public Sector Related Services	83xxxxxx
Published Products	55xxxxxx
Resin/Rosin/Rubber/Foam/Film/Elastomeric Materials	13xxxxxx
Service Industry Machinery Equipment & Supplies	48xxxxxx
Sports/Recreational Equipment, Accessories & Supplies	49xxxxxx
Structures/Building/Construction Components & Supplies	30xxxxxx
Timepieces/Jewelry/Gemstone Products	54xxxxxx
Tools/General Machinery	27xxxxxx
Transportation/Storage/Mail Services	78xxxxxx
Travel/Food/Lodging/Entertainment Services	90xxxxxx

## Commodity Codes\*

\*This is not a comprehensive list of all account codes but contains the most commonly used.

Air Conditioning Install/Maintenance/Repair Services	72102305
Audio Visual Equipment	52161500
Chartered Bus Services	78111803
Civil Engineering	81101500
Computers	43211500
Credenzas	56101701
Desks	56101703
Electrical Engineering	81101700
Handyman Services	72101501
Hosted Services	81112106
IT Services	81160000
Lab Ovens	41104500
Laboratory and Scientific Equipment	41100000
Mail & Cargo Transport	78000000
Mechanical Engineering	81101600
Professional Engineering Services	81100000
Rats	10101505
Software	43230000
Software Maintenance & Support	81112200
Task Seating	56112102

## **Account Codes\***

\*This is not a comprehensive list of all account codes but contains the most commonly used.

### **Services:**

Advertising  
Auditing & Acct Services  
Bank Service Charge  
Building Renovation  
Cellular & Paging Service  
Data Processing Service  
Education And Training  
Engineering & Architecture  
Freight, Express, Del  
General Repair  
Guest Package Charges  
Honorariums-Non-Us Resident  
Honorariums Us Resident  
Household ,Laundry, Jan, Sec  
HVAC Maintenance  
In Service Training State  
In Service Training-Non-State  
Legal  
Medical And Health  
Motorized Vehicle Services  
New Construct/Renovation  
Other Construction Service  
Office Equip Service  
Other Telephone Service  
Out Of State Registration  
Print Binding Library  
Printing-Binding  
Printing-Communication Vendor  
Procure Cd Service  
Storm Water Utility Fee  
Telephone And Telegraph  
Telephone/Internet  
Temp Service Commission  
Utilities

### **Supplies:**

710815  
710510  
710812  
710211  
710412  
710414  
710514  
710511  
710816  
710213  
710818  
710517  
710516  
710210  
710214  
710518  
710518  
710512  
710813  
710814  
710212  
710810  
710811  
710411  
710519  
710111  
710110  
710110  
710817  
710311  
710410  
710413  
710513  
710310

Clothing  
Const. & Renovation Supplies  
Data Processing-Supplies  
Educational Supplies  
Food Supplies  
Fuel Supplies  
Jan Supplies-General  
Library Books  
Library Journals  
Maintenance Supplies  
Medical Supplies  
Motor Vehicle Supplies  
Non-Cap Off/Ed Equip  
Non-Capital Comp Equip  
Non-Capital Other Equip  
Non-Capital Software  
Office Supplies  
Other Supplies  
Participant Supplies  
Photographic Supplies  
Postage  
Printing-In House  
Procure Cd Supplies  
Xerox Copies

720185  
720121  
720130  
720187  
720184  
720124  
720120  
720170  
720170  
720122  
720182  
720123  
720181  
720130  
720186  
720131  
720140  
720186  
720150  
720160  
720183  
720110  
720180  
720111

**Fixed Charges:**

Contributions	740311
Dues And Memberships	740310
Insurance-State Purchase	740410
Other Fixed Charges	740316
Pres Choice Awards	740225
Ren-Data Proc Equip	740111
Rental Other	740116
Rental-Non St Prop	740112
Rental-Office Equip	740110
Rental-State Prop	740113
Royalties	740313
Stipend - Federal	740224
Stipends	740222

**Equipment over \$5000:**

Computer Equipment	770110
Library Books	770116
Motor Vehicle Purchase	770113
Off/Ed Equipment	770112
Offsite Equipment	770111
Other Equipment	770115
Software Pack Purchase	770114

**Capital Project Codes** (Used Only With Capital Projects, 77xxxx)

Architecture Service	780210	Masonry	780514
Builder's Risk Insurance	780213	Millwork	780519
Cap Procure Cd Supply	780311	Mobilization	780610
Carpet	780524	Non-Cap Equip Other	780313
Concrete	780512	Plumbing	780526
Concrete Sidewalks	780513	Purchase Of Building	780111
Construction	780510	Purchase Of Land	780110
Cost Of Building Construction	780510	Renovation	780528
Doors	780520	Repair And Replace	780528
Electrical Systems	780529	Roofing	780522
Elevators/Escalators	780527	Rough Carpentry	780517
Finish Carpentry	780518	Site	780410
Finishes	780521	Site Work	780410
Fire Sprinkler System	780531	Special Construction	780525
Fixed Furniture-Cap	780310	Specialties	780523
Grading-Demolition	780411	Structural Steel	780515
HVAC	780516	Survey & Testing	780211
Ins & Surety Bond Cost	790120	Tangible Equipment	780312
Interior Decoration	780511		
Legal Fees	780212		
Lighting	780530		